



Application Number
09/880,170

Applicant(s)
Olga Milosavljevic, et al.

Filing Date
6/12/2001

Group Art Unit
3628

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(Including Author, Title, Date, Pertinent Pages, Etc.)

5mg	*AB	US Pending Patent Application No. 09/667,017, filed 9/20/2000, entitled SYSTEM AND METHOD FOR PROTFOLIO ANALYSIS, inventors Michelle Swenson et al.
↓	*AC	US Pending Patent Application No. 09/798,110, filed 4/1/2001, entitled SYSTEM AND METHOD FOR FORECASTING TAX EFFECTS ON FINANCIAL TRANSACTIONS, inventors John Foley et al.
	*AD	US Pending Patent Application No. 10/210,410, filed 7/31/2002, entitled METHOD AND SYSTEM FOR INTEGRATING INVESTMENT ADVICE WITH FINANCIAL ACCOUNT STATEMENT INFORMATION, inventor Robert Oros.
	*AE	US Pending Patent Application No. 10/698,140, filed 10/31/2003, entitled SYSTEM AND METHOD FOR PROVIDING FINANCIAL ADVICE FOR AN INVESTMENT PORTFOLIO, inventors James Patterson et al.

Examiner

Date Considered

10 / 02 / 06

Examiner: Initial if citation considered, whether or not citation is in conformance with MPEP Section 609; Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.